



J. MARION SIMS FOUNDATION

Annual Report
2014



A MESSAGE

FROM THE CHAIRMAN & PRESIDENT

“Some old, some new” was the theme of the foundation’s grant making in 2014. While we awarded funds to a number of familiar grantees to help them continue their important work, we also awarded a substantial amount of funding to organizations that proposed new projects and programs.

It was pleasing to see these proposals and to find them meritorious. For the last several years local organizations have not had the luxury to do new things, either because of their own financial conditions, or because they employed their time, energy, and dollars to meeting the immediate needs of citizens who felt the pain of hardship – or both. We drew encouragement from seeing organizations propose new ideas and new ways of carrying out or expanding their work.

Needs are still great in our area and local organizations still strive to meet the immediate needs of our citizens. But Lancaster County, Fort Lawn, and Great Falls proved once again to be resilient, and demonstrated willingness and desire to look to the future with vision and hope. That is good news indeed.

Sincerely,

R. Malcolm Edwards, MD
Chairman

James T. Morton
President



ADULT LITERACY & BASIC SKILLS GRANTS

*For more information about the Adult Literacy and Basic Skills Initiative, please see the foundation's three and six-year review publications at www.jmsims.org. Watch for the 12-year review publication to be released in October 2015.

The foundation has long held the belief that better health outcomes can be obtained through increased literacy, as research has established a direct correlation between peoples' literacy and their health as measured by a broad range of indicators. In 2014 the foundation concluded its Adult Literacy and Basic Skills Initiative begun in 2002* and plans to remain involved in literacy going forward. The foundation is issuing a review publication on the initiative's 12 years in October 2015.

In 2014 the foundation awarded the following grants totaling \$117,024:

CHESTER COUNTY LITERACY COUNCIL
\$13,125 for its "GAPP/Literacy 101" program

FAITH, HOPE & VICTORY CHRISTIAN CHURCH
\$16,680 for its "Community Powerhouse" program

CHRISTIAN SERVICES OF LANCASTER
\$5,190 for its "Up With Literacy and Basic Skills" program

FORT LAWN COMMUNITY CENTER
\$17,547 for its community literacy programs

COMMUNITIES IN SCHOOLS – LANCASTER
\$20,000 for its "YouthBuild" program

UNITED HERITAGE OUTREACH COALITION (AKA SOUTHSIDE ADULT FAMILY LITERACY)
\$11,984 for its community literacy programs

BROOKLYN SPRINGS ELEMENTARY SCHOOL
\$15,150 for its "Home Literacy Trail Program

LANCASTER AREA LITERACY COOPERATIVE
\$17,348 to support the work of its member programs

J. MARION SIMS FOUNDATION PRIORITIES & GUIDELINES

THE J. MARION SIMS FOUNDATION INVITES APPLICANTS FOR ITS RESPONSIVE GRANTS TO SUBMIT INNOVATIVE IDEAS IN THE AREAS OF PREVENTION AND EDUCATION TO ENHANCE HEALTH AND WELLNESS IN LANCASTER COUNTY, GREAT FALLS, AND FORT LAWN, SOUTH CAROLINA.

Interested candidates should call the foundation to schedule a pre-application meeting to be held no less than 30 days prior to the April 15 and October 15 responsive grant application deadlines. The foundation has closed its Adult Literacy and Basic Skills Initiative to new applicants and is focusing its efforts on working with programs to which it awarded grants from 2002-2004.

FUNDING PRIORITIES

- The beneficiaries of the grant must be located in Lancaster County, Great Falls, and/or Fort Lawn, South Carolina.
- The foundation will give priority to grant applicants for programs of community service that provide ongoing support.
- The foundation seeks to make grants that will have significant and lasting impact on the community.
- Potential grantees are encouraged to propose innovative collaborations and partnerships that respond to community needs.
- Proposals should emphasize preventive health care and creative ways of solving longstanding health and wellness concerns.
- The foundation will favor proposals for specific projects, rather than general operations.

FUNDING GUIDELINES

- Awards can be granted only to organizations and institutions exempt from federal taxation under Section 501(c)(3) of the Internal Revenue Code.
- All grants will be in accordance with the foundation's status as a tax-exempt 501(c)(3) organization.
- Single-year and multi-year grants will be awarded. "Seed grants" will not exceed three years.
- While the foundation places no limit on the amount that can be requested, trustees will consider the availability of funds and the impact of a large request.
- Since the foundation's board of trustees feels strongly that the orientation of grants should be in the area of projects and programs, funding in the following areas may be limited:
 - Operations
 - Capital improvement projects
 - Scholarships, conferences, or seminars that result only in professional advancement but provide no benefit to the greater community
 - Seed grants that do not address an urgent community need and do not demonstrate the potential for ongoing community support

THE FOUNDATION DOES NOT MAKE GRANTS TO OR FOR

- Individuals
- Indirect costs, including payments of a percentage of a grant to a local organization's national affiliate
- Indigent care
- Programs or projects generally considered to be the role of government
- Endowments
- Loans
- Retire Accumulated Debt
- Projects of organizations that primarily benefit their own members or adherents
- Tickets to charitable events or dinners
- Legislative lobbying or other political purposes

RESPONSIVE GRANTS

The foundation allocates a significant portion of its grant making dollars for awards in response to needs identified by various community organizations and agencies in its giving area. In 2014 Responsive Grants totaling \$1,996,365 were awarded to:

AMERICAN HEART ASSOCIATION

\$25,000 for its “CPR Anytime” project

AMERICAN RED CROSS

\$30,000 for its “Disaster Services and Disaster Preparedness/Readiness” program

CARENET

\$70,000 for its “CareHealth Centers”

CATAWBA CARE COALITION

\$75,000 for its “AIDS Free Generation Project”

CATAWBA RIVERKEEPERS

\$5,000 for its “2014 CREEK” (Catawba River Keeper Environmental Education and Kayaking) program

CHESTER COUNTY SCHOOL DISTRICT- GREAT FALLS MIDDLE/HIGH SCHOOL

\$36,722 for its “Save Our Students” program

CHILDREN’S ATTENTION HOME

\$15,000 for its “Shelter Program”

CHRISTIAN SERVICES

\$54,000 for its “Food Pantry” program

CITY OF LANCASTER FIRE SERVICE

\$17,768 for its “Fire Safety Program”

CLEMSON EXTENSION SERVICES

\$20,000 for its “Science on the Move” program

COLUMBUS PARKER TRACK CLUB

\$20,000 for its “Columbus Parker Track Club” program

EDUCATIONAL FOUNDATION OF USC LANCASTER

\$200,000 for the “USC Lancaster Nursing Simulation Lab

EDUCATIONAL FOUNDATION OF USC LANCASTER

\$55,000 for USC-L’s “Project ACCESS”

FORT LAWN COMMUNITY CENTER

\$180,000 challenge grant for its “FLCC Preschool Program

RESPONSIVE GRANTS

GOOD SAMARITAN MEDICAL CLINIC

\$29,400 for its “Primary Patient Care” program

GREAT FALLS RESCUE SQUAD

\$18,000 for its “Great Falls Rescue Extraction Project”

HOPE

\$265,962 for its “A New Day of HOPE” project

KARE

\$150,000 for its “Crisis Relief 2014-2015” project

KERSHAW COMMUNITY PARK COUNCIL

\$204,957 for its “Outdoor Education and Exercise Activity for Southern Lancaster County” project

KEYSTONE

\$50,000 for its “Lancaster County Detoxification and Bridging Program”

LANCASTER COUNTY COUNCIL OF THE ARTS

\$42,000 for its various arts programs

LANCASTER COUNTY PARKS AND RECREATION DEPARTMENT

\$126,000 for its “Field Lighting Completion and Renovations Project at Springdale Recreation Complex” project

LANCASTER COUNTY SCHOOL DISTRICT

\$55,000 for its “Swimming and Water Safety” program

LANCASTER COUNTY SHERIFF’S OFFICE

\$5,000 for its “Officer Safety and Training Project

LANCASTER FATHERHOOD PROJECT

\$131,525 for its “Reconnecting Low-Income Fathers through Health Access and Responsible Fatherhood” program

LIFE SKILLS OPPORTUNITY CORPORATION

\$29,960 for its “Quality Child Care Voucher Program”

PALMETTO CITIZENS AGAINST SEXUAL ASSAULT

\$16,500 for its “Children’s Advocacy Center Forensic Interviewer” program

THE CHILDREN’S COUNCIL

\$57,161 for its “Baby Basics” program

WINTHROP UNIVERSITY

\$11,410 for its “Non-Profit Management Certification Program”

TEACHERS PET GRANTS

The foundation offers certified education personnel in Lancaster County, Great Falls and Fort Lawn the opportunity to apply for grants of up to \$500 during the school year to develop and utilize creative, innovative, short-term projects that enhance the existing instructional program. Applicants are limited to one approved grant per school year.

During the 2013-14 school year the foundation awarded 287 Teachers Pet Grants totaling \$137,431. These grants bring the total of Teachers' Pet awards to 2,069 grants awarded for approximately \$957,356 since the program's inception.

The foundation continues to offer this program with the aim of inspiring and encouraging creative concepts that have the potential for enhancing community life through the education of youth.

The following schools were awarded Teachers' Pet Grants during 2013-14:

LANCASTER COUNTY

A.R. RUCKER MIDDLE SCHOOL
 ANDREW JACKSON MIDDLE SCHOOL
 ANDREW JACKSON HIGH SCHOOL
 BARR STREET LEARNING CENTER
 BROOKLYN SPRINGS ELEMENTARY SCHOOL
 BUFORD ELEMENTARY SCHOOL
 BUFORD MIDDLE SCHOOL
 BUFORD HIGH SCHOOL
 CLINTON ELEMENTARY SCHOOL
 DISCOVERY SCHOOL
 ERWIN ELEMENTARY SCHOOL
 HEATH SPRINGS ELEMENTARY SCHOOL
 INDIAN LAND ELEMENTARY SCHOOL
 INDIAN LAND MIDDLE SCHOOL
 INDIAN LAND HIGH SCHOOL
 KERSHAW ELEMENTARY SCHOOL
 MCDONALD GREEN ELEMENTARY SCHOOL
 NORTH ELEMENTARY SCHOOL
 SOUTH MIDDLE SCHOOL
 LANCASTER HIGH SCHOOL
 SOUTHSIDE EARLY CHILDHOOD

CHESTER COUNTY

GREAT FALLS ELEMENTARY SCHOOL
 GREAT FALLS MIDDLE SCHOOL
 GREAT FALLS HIGH SCHOOL
 LEWISVILLE ELEMENTARY SCHOOL
 LEWISVILLE MIDDLE SCHOOL
 LEWISVILLE HIGH SCHOOL

STATEMENT OF FINANCIAL POSITION

DECEMBER 31, 2014

ASSETS	2014	2013
Cash and cash equivalents	\$46,494	\$46,075
Investments, at fair value	69,855,899	70,876,059
Interest and dividends receivable	50,364	33,315
Prepaid expenses and other assets	9,422	10,170
Property and equipment, net of accumulated depreciation of \$337,893 and \$308,239	875,109	895,330
TOTAL ASSETS	\$70,837,288	\$71,860,949
LIABILITIES		
Accounts payable	\$22,853	\$25,814
Compensation and other accrued expenses	57,293	65,792
Federal excise tax payable	10,154	15,839
Deferred excise tax liability	175,264	201,852
Grants payable	482,911	268,711
Total liabilities	748,475	578,008
Net Assets		
Unrestricted	\$70,088,813	\$71,282,941
TOTAL LIABILITIES AND NET ASSETS	\$70,837,288	\$71,860,949

STATEMENT OF ACTIVITIES

DECEMBER 31, 2014

Support	2014	2013
Investment income (loss) and net appreciation (depreciation)	\$2,224,220	\$9,634,651
Expenses		
Grant expenses	2,383,339	1,817,060
Program operating and investment expenses	996,282	1,627,824
Federal excise tax	65,315	66,852
Deferred excise tax (benefit) expense	(26,588)	105,074
Total Expenses	3,418,348	3,616,810
Net increase (decrease) in unrestricted net assets	(1,194,128)	6,017,841
NET ASSETS, BEGINNING OF YEAR	71,282,941	65,265,100
NET ASSETS AT END OF YEAR	70,088,813	71,282,941

STANDING COMMITTEES

AUDIT

TRUSTEE MEMBERS

CHARLES M. HARRELL (CHAIR)
ROBERT K. FOLKS
TIMOTHY H. HALLMAN

EXECUTIVE

TRUSTEE MEMBERS

R. MALCOLM EDWARDS (CHAIR)
ROBERT K. FOLKS (VICE-CHAIR)
PAMELA Y. TEMPLE (SECRETARY)
PHYLLIS B. BUNKLEY (TREASURER)

FINANCE & INVESTMENT

TRUSTEE MEMBERS

STANLEY D. JOHNSON (CHAIR)
MIRIAM M. BOUCHER
PHYLLIS B. BUNKLEY
R. MALCOLM EDWARDS (EX-OFFICIO)
HUBERT F. MOBLEY
MARVIN L. STARKS
PAMELA Y. TEMPLE

NON-TRUSTEE MEMBERS

TONY GILREATH

GRANTS

TRUSTEE MEMBERS

MIRIAM M. BOUCHER (CHAIR)
R. MALCOLM EDWARDS (EX-OFFICIO)
ROBERT K. FOLKS
TIMOTHY H. HALLMAN
CHARLES M. HARRELL
POLLY C. JACKSON
STANLEY D. JOHNSON
PAMELA Y. TEMPLE

NON-TRUSTEE MEMBERS

COURTNEY CATLEDGE
DONNA HERCHEK
DEBRA P. JAILLETTE

BOARD DEVELOPMENT

TRUSTEE MEMBERS

POLLY C. JACKSON (CHAIR)
R. MALCOLM EDWARDS (EX-OFFICIO)
PHYLLIS B. BUNKLEY
ROBERT K. FOLKS
STANLEY D. JOHNSON

BOARD OF TRUSTEES



Seated: Polly C. Jackson, Hubert F. (Hugh) Mobley, R. PH., R. Malcolm Edwards, MD, Timothy H. Hallman and Miriam M. Boucher
Standing: Pamela Y. Temple, Marvin L. Starks, Charles M. Harrell, Robert K. Folks, Phyllis B. Bunkley and Stanley D. Johnson

STAFF



Pictured Left to Right: Holly C. Furr – Program Officer for Responsive Grants, Karen W. Ormand – Administrative Assistant, Jim T. Morton – President, Mary D. Henderson, PhD – Program Officer for Special Initiatives



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